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ABSTRACT

This publication examines the competency-based education (CBE) movement in Oregon, which resulted in the adoption of new Minimum State Requirements for Graduation in 1972 and the subsequent adoption of competency-based Minimum Standards for Oregon Public Schools in 1974. It first discusses the general characteristics of CBE and then suggests some reasons for the growing interest in CBE throughout the United States. Most of the paper reviews the development and adoption of CBE policies in Oregon, focusing in turn on the evolution of CBE policies in Oregon, a discussion of Oregon's competency-based minimum educational standards, the experience of Oregon school districts in implementing CBE requirements, and the problems experienced during CBE implementation in Oregon. The appendix contains a copy of the Minimum Standards for Oregon Public Schools, as well as the results of a survey that examined Oregon school districts' experiences with the new CBE requirements. (JG)

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COMPETENCY BASED EDUCATION IN OREGON

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Preface

Over the past decade, Oregon public education has been moving toward an outcome-oriented approach to elementary and secondary schooling that has come to be called "competency based education." The approach, diverse and evolving over the years, was clarified in the adoption of new Minimum State Requirements for Graduation by the Oregon State Board of Education in 1972. These requirements were the result of three years of discussion and review by educators and the public.

Two years after their adoption, the new graduation requirements became an integral part of a revision of a larger set of administrative rules--the new Minimum Standards for Oregon Public Schools, adopted by the State Board in 1974. The first biennial review by the Board, in 1976, considered the effect of the new standards on Oregon education, and resulted in revisions. The original requirements were clarified and modified. (The current set of standards is presented in Appendix 1).

Since all districts must comply with these standards in order to receive state financial support, Oregon by adopting the new graduation requirements and new standards, was mandating competency based education (CBE)--the first state to do so.

This paper describes the evolution of the CBE movement in Oregon. It discusses the characteristics of CBE and suggests reasons for the rapidly growing interest in it. More specifically, the paper reviews the development of CBE

policies in Oregon, and discusses: (1) the districts' implementation of CBE requirements, and (2) problems arising during implementation.

Ideas and information presented in other current documents of the Oregon Competency Based Education Program are reflected, in part, in this paper. For example, Paper 2, Alternative Models of Competency Based Education, presents a more extensive discussion of the characteristics of competency based education and describes some potential variations. Paper 4, Strategies for Implementation of CBE Models, discusses procedures for facilitating CBE program installation and for maintaining effective program operation. It also suggests tentative implications for OCBE Program techincal assistance activities. Paper 6, Alternative Methodologies for Competency Based Education--The State of the Art, discusses specific alternative methods used in CBE programs nationwide.

Acknowledgments

The Oregon Competency Based Education Program wishes to acknowledge the work of the primary author, Jack Knapp, and the contributions made by a number of other people to the development of this paper. Staff members of the OCBE Program, members of the Program's Policy Board, the Oregon Department of Education, and Oregon school district personnel contributed to the development of this paper. Substantial assistance was provided by Walter Hathaway, Dwight Fairbanks and Sandra Scofield of the OCBE Program. Also contributing were Don Egge and Mary Hall, Associate Superintendents of the Department of Education, R.B. Clemmer and Clark Smith of the Department's Planning, Assessment and Evaluation staff, and Sharon Case, Coordinator of Publications for the Department.

Chapter 1

WHAT IS COMPETENCY BASED EDUCATION?

CBE--An Emerging Concept

At present there is no single agreed upon definition of CBE, nor even an agreement about the elements necessary for an educational system to call itself "competency based." This chapter attempts to provide a formal definition that may be helpful in dialogue beyond the borders of Oregon's CBE effort, and it relates that definition to some of those external efforts. The primary focus of the definition, however, is on CBE as it exists in Oregon.

Various educational agencies have implemented programs that might be termed CBE, though not all are explicitly defined so. There are numerous differences among these programs and some are obvious in the notes on national efforts which follow:

1. The Anchorage, Alaska School District adopted competency based graduation requirements in basic English and mathematics.
2. The Los Angeles School Board specifies a minimum reading requirement for graduation.
3. The Denver School district requires graduates to demonstrate proficiency in language, reading, spelling and arithmetic.
4. The Florida system allows a "special" diploma that indicates competency in basic skills.

5. The Gary, Indiana school system will require minimum competencies for graduation.
6. New York State has adopted an external high school diploma, allowing adults to qualify for a diploma through demonstration of competencies.
7. The Regional Learning Service of Central New York has developed a system by which adults may earn a diploma through counseling and assessment. The procedures for attainment of the competencies are left to the individual student.
8. The Texas Adult Performance Level Program provides adults with a way of gaining a diploma by demonstrating mastery of selected competencies. Adult skills related to consumer awareness, societal awareness and functional literacy are assessed by tests and interviews.
9. The Virginia Standards of Quality Act, effective in July 1976, requires the development of minimum educational objectives and a uniform testing program in basic skills to be implemented within two years.

These certainly point to the seemingly limitless variations on competency based education. There are patterns or clusters of characteristics emerging, however, and they are summarized below.

1. <u>comprehensive</u> K-12 competency based education
2. K-12 competency based <u>basic</u> education
3. competency based <u>graduation</u> requirements
4. <u>adult</u> competency based high school <u>certification</u>

5. competency based course credit
6. competency based basic skills diagnosis and remediation
7. competency based assessment
8. competency based instruction
9. fostering of generic competencies

CBE Characteristics by OCBE Program Definition

In order to attempt to bring analytical clarity to the confusion surrounding the definition of CBE, the OCBE Program has proposed the following definition of CBE (Schalock 1976):

> ...a process that facilitates with a known degree of effectiveness the acquisition of desired outcomes in learners--including the ability to perform tasks related to success in job or life roles, documents the achievement of these outcomes, and links graduation requirements to specified performance levels or a particular set of outcomes.

An underlying principle of competency based secondary education is the belief that all students should be intellectually and emotionally prepared to cope with societal demands upon the completion of high school. Five elements of schooling are basic to the Oregon State CBE policy which is leading Oregon schcol districts toward the realization of that belief:

1. competency identification
2. competency based instruction
3. evaluation of student performance on competencies
4. certification of students on the basis of demonstration of competencies

5. program evaluation and modification based on student achievement of competencies

Although there are other useful analyses of CBE, this one best characterizes CBE in Oregon and establishes boundaries for discussing it.

Chapter 2

WHY THE INTEREST IN CBE?

The Public Dollar and the Public Eye

From a level of 10 billion dollars in 1950, expenditures for education have soared to 110 billion dollars in 1975. Of this, some 80 percent is public funds. The public is increasingly asking for an accounting of this huge investment. There seems to be a special concern with how the system is exerting organizational control for preparing young people to cope with the increasingly complex world that will be challenging their skills as parents, consumers, and citizens. Evaluating what is put into the schools is no longer considered an adequate basis for judging their quality. Evaluating the outcomes of schooling offers a more viable way to insure and demonstrate that our schools really do prepare students, not only for college and for development of their potential in general ways, but more particularly as knowledgeable adults.

A Developing Indictment

Both the popular and professional press have expressed the generally felt concern for the inability of many of today's youth to enter adult society. A report of the National Association of Secondary School Princpals summarized many of those concerns:

1. Scores on the Scholastic Aptitude Test (SAT) have fallen from a mean of 473 on the verbal section in 1965 to a mean of 434 in 1975; and from a mean of 496 on the mathematics section in 1965 to a mean of 472 in 1975.
2. The National Assessment of Educational Progress (NAEP) in 1975 reported a decline in science knowledge among American students between 1969 and 1973 equivalent to a half-year loss in learning.
3. NAEP also has reported in a nationwide survey of 17 year old students and young adults that "many consumers are not prepared to shop wisely because of their inability to use fundamental math principles such as figuring with fractions or working with percents."
4. Twenty-three million Americans are functionally illiterate, according to a study sponsored by the U.S. Office of Education.
5. Comparative surveys of writing skills in 1970 and 1974 show 13 and 17-year old youth to be using a more limited vocabulary and writing in a shorter, more "primer-like" style in 1974 than in 1970.
6. American College Testing (ACT) program also has reported a decline in the average scores of students applying for college admission.
7. The Association of American Publishers revised its testbook study guide for college freshmen in 1975, gearing the reading level down to the ninth grade.
8. College officials, business firms, and public agencies are dismayed at the inability of younger persons to express themselves clearly in writing. (NASSP, 1976).

The Educational Response

Although the public concern over reports of the purported failure of American schools to adequately serve at least some portion of their students has been an important force of the evolving CBE movement, the major initiatives have come from professional educators. Many educators have been working for a considerable length of time toward concepts we now call CBE. Their concern and the growing public lament have converged in the CBE movement. Perhaps this helps to explain its rapid growth.

A recent survey by the National Center for Educational Statistics reports that CBE activities are occurring "in 29 states with a combined student population of over 31 million (which) represents about 67 percent of the total public school enrollment in the United States" (Goor et al., 1976).

In reviewing the growing commitment to CBE on the part of states, Dr. Chris Pipho, Associate Director of Research and Information Services of the Education Commission of the States, observed in the June 1976 National Assessment of Educational Progress Newsletter that legislation is moving through state capitols so rapidly "that day to day bulletins are needed to keep up..." This growing interest in the implementation of CBE has heightened the importance of studying CBE in Oregon, where state policy level support for its implementation dates back at least five years.

The Oregon Commitment to CBE

The significance and influence of the Oregon commitment to CBE was highlighted by the National Association of Secondary School Principals in their recent monograph on Competency Tests and Graduation Requirements (Clark and Thompson, 1976). The NASSP task force observed that "the state of Oregon in 1973... (required)... graduates of the class of 1978 to demonstrate proficiencies in 20 areas. Perhaps because of Oregon's well-publicized decision, interest grew during 1975 and 1976 so that some 20 jurisdictions currently include competencies as part of their requirements for the high school diploma."

Movement towards CBE in Oregon began with a commitment to graduate students who had demonstrated competencies judged important for functioning in today's complex society. That was but the beginning. Under state and local impetus, CBE has grown to include through the new Minimum Standards the major elements of a comprehensive competency based approach to schooling which is described in the following chapters.

Chapter 3

THE EVOLUTION OF CBE POLICIES IN OREGON

New Graduation Requirements

Traditionally, Oregon's graduation requirements, which were established in 1878, were based on the student earning units of credit by successfully completing a minimum number of hours of classroom work. Although these requirements were reviewed and revised periodically, the basis of the requirements, the Carnegie unit, remained unchanged.

In the 1960's and 1970's it became apparent to the Oregon Board of Education that the traditional graduation requirements were meeting neither the changing needs of students nor the concerns of the public and the educational profession. Some of the educational trends recently emerging in Oregon and the nation that influenced the Board to consider an alternative means of certifying students are listed below.

1. The curriculum was changing. More innovative courses were making the traditional graduation requirements unrealistic and inadequate.
2. The programs of the schools were being adopted to the needs of all students, not just those who were college-bound.
3. Procedures to measure student achievement in terms of educational outcomes were being called for by the advocates of "accountability."

4. Off-campus learning experiences were capturing the interest of educators, students and the community.
5. Major statewide programs (in such areas as career development) were being developed to respond to specific student needs.
6. Employers and others began calling for a meaningful high school credential, certifying graduates' abilities or competencies.

Furthermore, several events took place in Oregon that signaled a willingness to consider changing the graduation requirements. (Oliver 1974) These events were:

1. Innovations by some of the state's school districts in the 1960's indicated a willingness to develop new educational programs along the lines of competency based education.
2. A 1969 "Needs Assessment Study" was conducted by the Department of Education to determine what the general public, educators, students, and high school dropouts felt were important aspects of the state's educational program.
3. A 1969-70 study on high school graduation requirements conducted by the Oregon Association of Secondary School Administrators at the request of the Superintendent of Public Instruction resulted in recommendations later incorporated in the graduation requirements.
4. Public meetings in late 1969 and early 1970 which were conducted by the state superintendent and some members of the Board of Education elicited strong public

statements of desire for changes in educational programs.

5. Legislative action, primarily the development of two education bills by an interim committee of the 1971 legislative session, signaled legislative desire for change.

The first draft of the new graduation requirements and a plan for implementing them were approved by the State Board of Education in September 1971. The Oregon Association of Secondary School Administrators, the Oregon PTA, and many other education-related groups reviewed this and subsequent drafts. In all, four drafts were developed before the State Board of Education officially approved the graduation requirements in September 1972 for implementation with the graduating classes of 1978.

One of the issues in these discussions centered about "survival-level competencies." The first draft listed all the survival skills a student would need in order to graduate, operating from the assumption that specification of minimum competencies in the state graduation requirements would assure equal educational opportunities for every student in Oregon.

The prevailing argument, mainly from school districts, was that by specifying minimum competencies the state would take away the traditional right of school districts to define their own educational programs, determined by local needs. The final version left the determination of survival-level competencies to individual school districts.

Teacher Standards and Practices Commission

Concurrently with the development of the state policies for competency based graduation requirements, the Teacher Standards and Practices Commission was established. Through this agency, Oregon educators exert authority to maintain and improve performance of members of the education profession. The Commission, composed of teachers, administrators and representatives of teacher preparation institutions, establishes rules for certification, issues teaching certificates, and takes appropriate disciplinary action against teachers found to be in violation of Oregon statutes or performance standards. Additionally, the Commission, through the Experience Assessment Board, implements the certification of administration on the basis of competency and experience.

State Goals for Education

The state goals become effective September 1, 1975. These goals, adapted by the State Board of Education, give direction to all the instructional programs of the public schools in Oregon. By setting goals to prepare students to function effectively in six life roles (individual, learner, producer, citizen, consumer, family member), the Board has established a posture for the public schools that emphasizes the outcomes of education. Furthermore, the goals provide a foundation upon which local districts may build their goal-based planning. The Minimum Standards do not specify

compliance criteria, but rather state that "the goals shall be implemented through the district, program and course goals of each local school district" (Minimum Standards, 1976).

Oregon's Goal-Based Planning Model as a Framework for CBE

A major force in support of competency based education in Oregon has been a state planning model for elementary and secondary schools based on the setting of goals. Goal-based planning helps the schools become "accountable" to the communities that support them by shifting the emphasis from input (chiefly resources) to outcomes (identifying, planning, teaching, and measuring those skills which the community expects from its graduates).

Oregon's goal-based planning model provides a framework for CBE. The Oregon model has 10 steps. Each step may be implemented in the schools by adopting the procedures of one or more of the minimum standards. An explanation of each of the 10 steps and a summary of the minimum standard appropriate to each step follows.

1. Goals are set or revised. The standards require school districts to develop interrelated sets of district, program, and specific course goals. Goals are based on the educational needs or preferences of the community.

2. Assessment is conducted. School districts are to collect and report assessment data and other information about student performance that relates to the program and course goals. The district shall also measure and certify individual student progress toward development of the minimum competencies required for graduation.

3. Needs are identified. Districts will identify discrepancies between desired and actual student achievement. By adopting and implementing diagnostic procedures, districts will assure identification of each student's learning strengths, problems, interests, and potential in relation to the basic skills, as well as program areas needing improvement.

4. Needs are prioritized. Once identified, needs are placed in order according to importance.

5. Objectives are developed or modified. At this point in the planning cycle the districts adopt and implement plans and procedures to meet the instructional needs of students "by providing objectives or activities that address learning strengths, problems, interests, or handicaps."

6. Alternative plans are identified. Although there may be a number of alternative ways for making program improvements to meet priority needs, the subject areas for instruction are mandated. These are communication skills, mathematics, science, social science, health education, physical education, music education, and the visual and performing arts. The requirements for attendance are also established.

7. A plan is selected or modified. A feasible plan for instruction selected by a district would be based on its available resources and constraints but would, according to the standards, provide students with the opportunities to acquire knowledge and skills in at least three areas: personal development, social responsibility, and career development. It is in these three areas that the minimum competencies required for graduation are to be developed.

8. Resources are allocated or shifted. Resources for conducting the instructional program are identified, budgetary commitments are made, and funds are allocated.

9. The plan is implemented. The standards require school districts to implement the high school graduation requirements adopted by the State Board of Education and to establish administrative policies and procedures to insure that educational programs will be conducted effectively.

10. The outcomes of the plan are evaluated. Differences between "actual" and "intended" outcomes are identified and judgments are made to take corrective steps. The standards speak to this point in the planning cycle by establishing the requirements for diplomas and certificates of competency. To repeat, "A diploma shall be granted upon fulfillment of all credit, competency, and attendance requirements set by the state and local district" and a certificate of competency may be awarded to those students "who have met some, but not all of the requirements for a diploma, and have chosen to end their formal school experiences."

Program Budgeting Systems

While the new budgeting and accounting system was not developed by the state, it has a close correlation with the statewide planning model used in Oregon. Unlike the traditional "line-item" system, the new system allows the costs of programs to be measured. This system gives school systems the capability of getting to the real issues of accountability: "Are we getting the value from education in relation to the costs?" The Oregon Board of Education has required that all districts comply with the new budgeting and accounting system to level III by July of 1976.

The New Minimum Standards for Oregon Public Schools

In 1974, the new Minimum Standards for Oregon Public Schools were passed by the Oregon Board of Education. In May 1975, the Pre-publication Draft of the Elementary and Secondary Guide for Oregon Public Schools was approved.

The purpose of the Guide was to define the new Minimum Standards in terms of performance requirements for public schools. The Guide outlined "indicators of compliance." If a school district could meet all of the indicators of compliance, the district would be certified as a "standard" district. Additionally, the Guide outlined "indicators of quality." The quality indicators could be considered to be the process goals for school districts. While the compliance indicators established the minimum requirements for school districts, the quality indicators went beyond the minimums in setting higher goals.

In 1976, the Oregon Board revised the new standards. The new standards are discussed in the following Chapter and are presented in Appendix 1. A review of the Guide is under way and will be available early in 1977.

A summary of some of the shifts in policy implicit in the major policy decisions reviewed above is presented in Figure 1.

Figure 1

A Summary of the Shifts in Policy

POLICY FOCUS	POLICY SHIFT FROM	TO
RESPONSIBILITY FOR SCHOOLING	THE SCHOOLS ASSUMING THE TOTAL LOAD WITHIN ITS WALLS	SHARING WITH THE COMMUNITY
LEARNER ACCOMPLISHMENT	TIME HELD CONSTANT AND STANDARDS VARIABLE	TIME IS VARIABLE & STANDARDS CONSTANT
SCHOOLING EFFECTIVENESS ANALYSIS	RESOURCES AS THE FOCUS	RESULTS (PERFORMANCE OF CLIENT) AS THE FOCUS
INSTRUCTIONAL PLANNING AND EVALUATION	TEXTBOOK AND CONTENT EMPHASIS	GOAL-BASED AND SYSTEMATIC
	GROUP BASED	DOCUMENTED
		RECOGNITION OF NEW CONTENT
		GROUP & PERSONAL
BASIS FOR CERTIFYING COMPLETION OF SCHOOLING	TIME	TIME
	CREDIT	CREDIT
		STUDENT PROGRESS TOWARD EFFECTIVENESS IN LIFE'S ROLE
INSTRUCTION	SCHOOL CENTERED	COMMUNITY CENTERED
		EXPERIENCE BASED

Chapter 4

WHAT IS COMPETENCY BASED EDUCATION IN OREGON?

While all the Oregon educational policy changes discussed in the previous chapter have helped to support and guide the emergence of CBE in Oregon, it is the new Graduation Requirements and more recently and comprehensively the new Minimum Standards which provide focus and support for local CBE implementation efforts. In the pages that follow, therefore, a detailed discussion of those standards is presented.

Oregon Minimum Requirements for High School Graduation

With the adoption of these requirements in 1972, the Oregon Board of Education required a comprehensive implementation response from local districts by 1978, allowing a six-year period for the development of competency based graduation systems. Because the new requirements changed the criteria for determining whether or not a student merits a high school diploma, they also changed the systems for measuring and recording student performances of these criteria. Whereas one major requirement for students is now the successful demonstration of district determined competencies, several requirements for the districts themselves are related, including the following:

1. Identification of performance indicators acceptable to the district as evidence that individual students have attained the specific minimum competencies.

2. Development of mechanisms to assure careful monitoring of student progress in attaining competencies and provisions for appropriate instructional help.
3. Development of recordkeeping systems to insure that student achievement of competencies is documented and transferred to student transcripts.
4. Development of "course statements" relating to the graduation requirements for all secondary-level courses (e.g., statements of goals, minimum competencies to be taught in courses, instructional options, and evaluation methods).

Oregon Minimum Standards for Public Schools

The new minimum standards which incorporate the new minimum graduation requirements were adopted by the Oregon Board of Education in 1974. Local districts are required to implement them on a staggered schedule beginning in 1975 and ending in 1981. Table 1 presents the broad implementation schedule with all the standards presented in Appendix 1 taking force immediately except as noted in the Table. These standards, which are used to evaluate schools and make school districts eligible for state financial support, changed the focus of school accreditation. While the previous standards focused on system "inputs" (the number of books in the library, classroom space, recreation equipment, etc.), the new standards focused on system "outcomes" and "processes" (content and method of instruction, student skills, teacher preparation, etc.).

Competency based features of the new minimum standards for Oregon school accreditation are listed below:

1. Provision to elementary students of opportunities to acquire knowledge and skills applicable to the minimum competencies required for graduation as adopted by the receiving high school.
2. Adoption of a system of instructional planning which will: provide for establishing goals (K-12); allow for community participation in selecting instructional outcomes; include assessment of student performance; and apply these data to decisions on instructional priorities and program changes.
3. Initiation of a classroom system of diagnosis and prescription to assure that each child acquires basic communication and mathematics skills and also acquires a basis for achieving competencies.
4. Adoption of policies and programs which assure that services such as transportation, building construction, and media centers effectively support the operation of the competency based instructional program.

It should be noted that the only sense in which these standards are "minimum" is that all districts must comply with them. They are not minimum relative to the concept of CBE since they go further than any other current statewide policy in requiring that elements of CBE be implemented by local school districts and since they legitimize the most enthusiastic approaches to CBE implementation which local districts may choose.

TABLE 1

IMPLEMENTATION SCHEDULE

Minimum Standards for Public Schools (Chapter 581, Division 22 Oregon Administrative Rules) are effective for the 1976-77 school year, and local school district accreditation will be based on those rules beginning with the 1976-77 school year, *WITH THE FOLLOWING EXCEPTIONS:*

ADMINISTRATIVE RULE	SCHOOL YEAR EFFECTIVE			
	1977-78	1978-79	1979-80	1980-81
Instructional Planning 581-22-208				
2. Assessment			X	
3. Needs Identification				X
4. Program Improvements				X
Educational Program 581-22-218			X	
Elementary Instruction Applicable to Required Competencies 581-22-222	X			
Local District Responsibility for Implementation 581-22-236				
2. Certify attainment of competencies necessary to read, write, speak, listen, analyze and compute	X			
3. Certify attainment of all competencies				X

ALL 581-22 RULES (200-300)–EXCEPT AS ABOVE–*EFFECTIVE 1976-77*

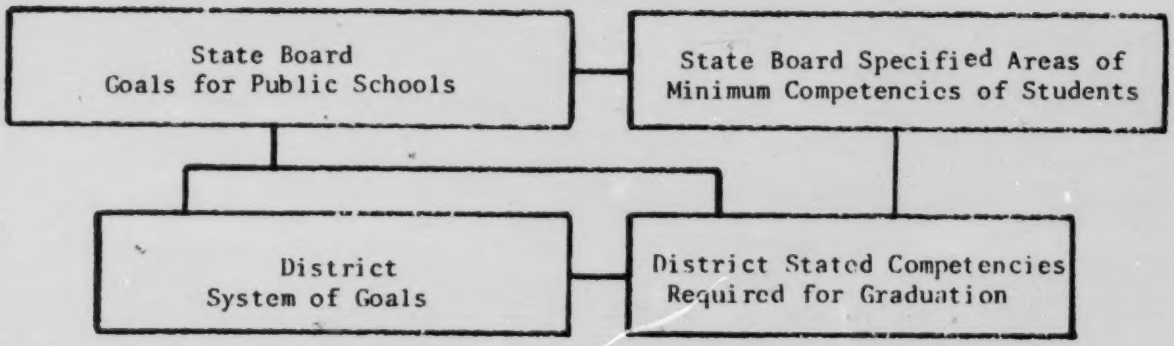
Organization and Legal Basis of the Minimum Standards

The Minimum Standards are found in the Oregon Administrative Rules (OAR) which the Oregon Board develops and with which all public schools must comply. (See Appendix I) The purpose of the Standards is to provide evaluative criteria by which schools may become "Standard" and thereby be eligible to receive financial support from the General Fund of the State of Oregon. The Superintendent of Public Instruction initiates standardization visits to public elementary and secondary schools on a regular basis and may classify a school to be Standard, Non-standard, or Conditionally Standard. (OAR 22-202-04)

CBE and the Minimum Standards

Elements of competency based education have been described for the purpose of this paper in Chapter 1. CBE in Oregon, however, is not a single concept that can be isolated and defined outside of the total educational picture. Competency identification, instruction, measurement, and recordkeeping processes at the state or local level may be singled out for examination, but in implementation and operation the intention is to link them with the total outcomes of schooling. At the local school district level, the linkage of competencies and outcomes is largely a local responsibility, with guidelines and directions from the Oregon Department of Education. This relationship is illustrated in Figure 2.

Figure 2.


State Board
Goals for Public Schools
State Board Specified Areas of
Minimum Competencies of Students
District
System of Goals
District Stated Competencies
Required for Graduation

The relationship between the elements of CBE and the Administrative Rules contained in the Minimum Standards is illustrated by Table 2.

Table 2

A COMPARISON OF THE MINIMUM STANDARDS WITH

THE ELEMENTS OF CBE

Oregon Administrative Rule Number	OAR TITLE	CBE Elements
22-200	Definitions	Definitions of CBE elements in the Oregon context.
22-201	Goals for Elementary and Secondary Education	Identification of outcomes.
22-208	Instructional Planning	Identification of outcomes Measurement of outcomes.
22-218	Educational Program	Instruction designed to support outcomes and the unique needs and abilities of students. Recordkeeping that allows the parents, teacher, and student to monitor student progress toward meeting outcomes.
22-221	Elementary Instructional Program	Instruction designed to support outcomes.
22-222	Elementary Instruction Applicable to Required Competencies	Instruction designed to support competencies.
22-226	Graduation Requirements	Instruction designed to support outcomes and competencies.
22-228	Diplomas and Certificates of Competency	The requirement that competencies must be demonstrated as a requirement for graduation.
22-231	Performance Requirements for Program Completion	The identification of graduation competencies defined in life-role terms. Measurement of competencies. Competency recordkeeping. Instruction designed to support competencies. The permitting of flexible settings for competency learning.

Table 2
(cont.)
A COMPARISON OF THE MINIMUM STANDARDS WITH

THE ELEMENTS OF CBE

Oregon Administrative Rule Number	OAR TITLE	CBE Elements
22-234	Developing Appropriate Electives and Additional Course offerings beyond State Minimums	Instruction designed to support outcomes and unique needs of students.
22-236	Local District Responsibility for Implementation	(Compliance dates)

The CBE elements of the Minimum Standards are found in the Oregon Administrative Rules 22-200 through 22-236. The Standards contain other requirements for local school districts that do not pertain to CBE or instructional services.

The following paragraphs discuss, in turn, each of the standards that express or imply a "demand" for implementing competency based education in Oregon. The standard is described and its relation to CBE is analyzed. Quotations appearing in these descriptions are from the Standards.

OAR 22-200, Definitions

This section of the Rules defines the terms that are used in the remainder of the standards. While the definitions do not require any special action by local school districts, they are extremely important for the interpretation by local districts in their implementation of the Standards. Reference will be made to the definitions when it is appropriate.

OAR 22-201, Goals for Elementary and Secondary Education

The State Board of Education statewide goals for elementary and secondary education give direction to all the instructional programs of the public schools in Oregon. By setting goals to prepare students to function effectively in six life roles, the Board has established a

posture for the public schools that emphasizes the outcomes of education. This Rule states: "...every student in the elementary and secondary schools have the opportunity to learn to function effectively in six life roles:

Individual

Learner

Producer

Citizen

Consumer, and

Family Member."

While these statewide goals, which became effective Setpember 1, 1975, do not specify the compliance requirements for the local district, they do state that the "goals shall be implemented through the district, program and course goals of each local school district." They thus provide leadership and continuity across the CBE programs being mounted in each Oregon school district.

OAR 22-202 through 206

These standards establish the legal basis for the Minimum Standards and outline the procedure for standardization visits to local districts.

OAR 22-208, Instructional Planning

This complex standard, while not mentioning the concept of "competencies," is the foundation stone upon which the Oregon Department of Education built the new Minimum

Standards. The Rule states "Each local district shall adopt and implement a system of instructional program planning and assessment..." Note that the local district is required to implement a system of instructional program planning and a system of instructional program assessment. The rule then specifies in subsection 1 what the local district must do in order to demonstrate that they have implemented a system of program planning. Each district must adopt and implement sets of goals including the following:

(a) District goals...

(b) Program goals contributing to achievement of district goals...

(c) Course goals contributing to achievement of program goals...

The rationale for this requirement is that it requires local districts to publicly identify all the outcomes of schooling that they will be responsible for teaching, not just the minimum competencies required for graduation. There are no subject matter or stylistic constraints on these goals other than that they should be written in student outcome terms. It is in these district, program and course goals that the highest ideals of the local school district will be found.

Subsections 2 and 3 outline the district requirements for implementing a system of instructional program assessment in the basic skills. According to the (proposed) Guide "To be in compliance with this requirement, several steps are necessary:

a. select the programs in which assessment is to take place;

b. examine the programs to determine the extent to which reading, writing, and computing are either developed or applied in reaching the goals the district has adopted for such programs;

c. perform a sound assessment of student performance on these basic skills applicable to the program;

d. report the results to the local community."

(Pre-publication draft of the Elementary/Secondary Guide.)

Subsection 4 of this standard requires districts to develop policies and procedures for making program improvements in the basic skills based on the assessment conducted under subsection 2.

The rationale behind this rule can be traced to previous versions of the Minimum Standards that required districts to assess the effectiveness of all programs through the program goals. Since districts did not have the capabilities to conduct program goal assessment throughout the entire system, they were allowed to conduct assessment in the basic skills only. This assessment must be conducted through existing instructional programs, however.

OAR 22-218, Educational Program

Each school district in compliance with this standard shall have adopted procedures to:

1. Identify individuals' learning strengths and weaknesses;
2. Provide learning opportunities for students responsive to their needs;
3. Determine progress students make in their educational program;
4. Maintain student progress records and report the information to parents and students.

The purpose of this standard is to insure that all students have the opportunity to achieve "district adopted learner outcomes, requirements for graduation and personal goals" within the educational environment provided by the local district.

Implicit in this standard is a strong move toward individualization of educational programs according to the needs of students. Whereas OAR 22-208 requires districts to state the goals of a district, this standard requires that instruction be tailored to meet the individual needs of students.

OAR 22-222, Elementary Instruction
Applicable to Required Competencies

This section of the standard requires elementary districts to provide students with "the opportunities to acquire knowledge and skills applicable to minimum competencies required for graduation adopted for receiving schools." Since the original implementation of CBE that appeared in 1972 only required secondary schools to deal with competencies, this standard extends the responsibility for competency instruction into grades kindergarten through grade 8.

OAR 22-224, Graduation Requirements
(Class of 1977)

This is a grandfather clause that maintains the previous graduation requirements until full implementation of the new graduation requirements has been accomplished. This clause will be repealed when it is no longer needed.

OAR 22-226, Graduation Requirements

This administrative rule requires the completion of a minimum of 21 units of credit during grades nine through twelve, of which 11 must be earned in specified subject areas and 10 may be elective.

The specific credit requirements are:

a.	Language Art/English	3 units
b.	Mathematics	1 unit
c.	Social Studies/History	1 unit
d.	Citizenship/Government	1 unit
e.	Science	1 unit
f.	Health Education	1 unit
g.	Physical Education	1 unit
h.	Consumer Education/Economics/ Personal Finance	1 unit
i.	Career Education	1 unit
j.	Electives	10 units
	TOTAL	21 units

Subsections of this standard allow local boards to alter the number of elective credits required, and establish additional credit requirements beyond the minimum number; they also require that planned course statements be written for all courses in grades 9 through 12 and that they be available to students, staff, parents, the local board, and interested citizens.

OAR 22-228, Diplomas and Certificates of Competency

This rule requires that "The local board shall award a diploma upon fulfillment of all state and local district credit, competency and attendance requirements." The Oregon Board of Education, in its consistent wording of this section since 1972, emphasizes the unique character of competency based education in Oregon. And,

parenthetically, this issue may cast doubt as to whether or not the Oregon system is competency "based," or, as some claim it is competency "augmented" education. It should be noted that while the Oregon Board of Education was willing to add the concept of demonstrated performance, they were not willing to abandon the Carnegie unit or attendance as bases for graduation. The NASSP Special Task Force Report on Graudation Requirements supported this point of view when it reported the following:

> The task force believes that qualification for the high school diploma, therefore, should include verification by course and by competency. The use of both approaches strengthens the measurement process and adds authenticity to the diploma. Competency measures should be used to document completion of courses and programs. Together they make the evaluation picture complete. (NASSP, 1975).

As an illustration of this combination of competency, credit and attendance requirements for graduation, the Oregon Department of Education compared this system to to a three-legged stool:

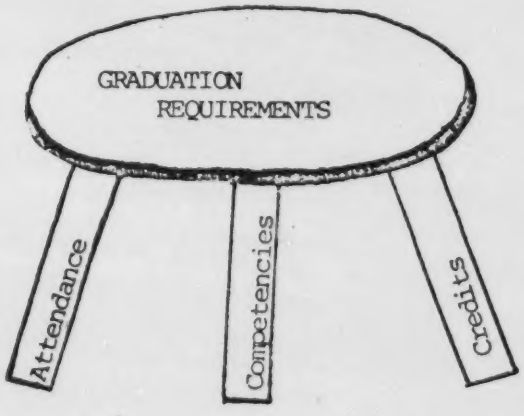


FIGURE 3

Subsection 2 of this standard allows local boards, at their option, to grant certificates of competency to students "having met some but not all requirements for the diploma and having chosen to end their formal school experiences." According to the NASSP Task Force:

> For the nongraduate, these certificates should be seen as an interim record of progress. By receiving something rather than nothing upon leaving school, the student may be encouraged to return to complete his education. The task force strongly endorses the concept that phasing in and out of formal schooling may be a positive experience for some students, especially if they are encouraged by schools to return and complete requirements for the diploma. (NASSP, 1975)

OAR 22-231, Performance Requirements for Program Completion

This is the second "leg of the stool" and is the heart of the competency movement in Oregon. This section also has remained very similar to the initial document that was introduced in 1972. This standard requires the following:

> Student transcripts shall record demonstration of minimum competencies necessary to:
>
> a. Read, write, speak, listen;
> b. Analyze;
> c. Compute;
> d. Use basic scientific and technological processes;
> e. Develop and maintain a healthy mind and body;
> f. Be an informed citizen in the community, state, and nation;
> g. Be an informed citizen in interaction with environment;
> h. Be an informed citizen on streets and highways;

i. Be an informed consumer of goods and services;
j. Function within an occupation or continue education leading to a career.

Whereas the Oregon Board specifies the areas of required competencies, it is the local board that must identify and adopt the specific minimum competencies it will require for graduation. Furthermore, this standard requires the local district to provide "necessary instruction" for students in order to meet and demonstrate these competencies. The local district is then required to "identify the performance indicators used for competency verification."

The third subsection of this standard allows local districts to alter performance indicators and to waive or substitute competencies in unique cases to accommodate special needs and abilities of individual students.

OAR 22-232, Attendance

This is the third, and final, leg of the stool. Beginning with grade one, 12 years of planned educational experience is required. Districts, however, may adopt policies of early or delayed completion of all state and local program, credit and performance requirements. In other words, districts are encouraged to introduce flexibility into the attendance requirement as long as the "age and maturity of students, access to alternative learning experiences, performance levels, desires of parents or guardians, and local board guidelines" are taken into consideration.

OAR 22-234, Developing Appropriate Electives and Additional Course Offerings Beyond State Minimums

This standard encourages local districts to develop elective offerings providing students opportunities to earn a minimum of ten elective units of high school credit although districts may reduce that number. The standard does require that the electives offered "be structured in terms of identified student needs for diverse experiences in vocational, scientific, fine arts, modern language and humanities education."

OAR 22-236, Local District Responsibility for Implementation

The first subsection of this standard requires school districts to "establish the minimum competencies and performance indicators beginning with the graduating class of 1978." While school districts may implement all the competency areas for graduation earlier, the state is allowing a gradual phasing-in of the competencies. The competencies in reading, writing, speaking, listening, analyzing, and computing must be certified for graduation with the class of 1978. Certification of all the other competencies areas mentioned in OAR 22-231 must begin not later than with the graduating class of 1981. The original mandate of the New Graduation Requirements of 1972 required

that all competency areas be implemented with the class of 1978. However, because of the extreme pressures in implementing this new program, local districts are being allowed to implement on a gradual basis. In the next chapter, the process of local implementation of CBE under the direction of the new standards is discussed.

Chapter 5

DISTRICT IMPLEMENTATION OF CBE IN OREGON

Implementation Schedule for 1972 Graduation Requirements

Under the terms of the administrative rules related to the graduation requirements passed by the Oregon Board in 1972, all secondary districts were required to file a plan for implementing the new requirements. This plan had to be filed with and approved by the State Board of Education by July 1, 1974. Additionally, the rule stated that "The requirements shall be applicable to the high school graduation class of 1978" (OAR 22-135). Local districts had the option of implementing the new requirements earlier, but at a minimum, when the class of 1978 entered the 10th grade in September 1974, programs must have been implemented to accommodate the new requirements for that class and every subsequent class. For most high schools, this meant that they must have partial implementation in September 1974 and full implementation by September 1977.

Oregon Department of Education Models and Guidelines for District Implementation of New Graduation Requirements

In preparation for that requirement, the Oregon Department of Education, aided in part by ESEA, Title III funds, began

doing groundwork. From November 1972 to May 1973 six project groups began the development of guidelines and materials to help school districts. The six project reports were synthesized in May and were published in four documents in September 1973.

- Oregon Graduation Requirements - Administrative Guidelines outlines the district plan for implementation and makes general suggestions for local project managers.
- Personal Development Education provides models a district can use to select and describe competencies in the following areas: mastering the basic skills; understanding scientific and technological processes; developing and maintaining a healthy mind and body; remaining a lifelong learner. In the area of basic skills, for example, the document lists five suggested program goals, the competencies (or course goals) for each program, and sample performance indicators for each competency.
- Social Responsibility Education can be used by districts to help define those competencies students would need in order to behave as responsible citizens. This would entail being protective of the environment, being responsible on the streets and highways, and acting as an informed consumer of goods and services. Again, program goals, competencies, and sample performance indicators are suggested.

- Career Development Education suggests goals, competencies, and performance indicators for career development education similar to the other two areas of study presented above. General career competencies are suggested, as well as specific ones for food service, metals, and nine other occupational areas.

For each element of the requirements, including that relating to competency identification, the district had three options:

Option A: To adopt the examples given in the guide.

Option B: To adapt the examples given in the guide by making adjustments in the state's definitions.

Option C: To develop their own competencies and/or policies and procedures.

In response to many requests from school districts a second task force was found under the Tri-county Graduation Requirements Project. This group developed the following materials that were published in September 1974.

- Oregon Graduation Requirements - Guidelines for Record Keeping Procedures and Sample Forms. This document outlines the various requirements in keeping competency records and suggests guidelines for developing a record keeping system in a school system.
- Oregon Graduation Requirements - Guidelines for Planned Course Statements explains the state requirements related to planned course statements and suggests alternative formats for documenting planned courses.

The Oregon Department of Education also undertook the following activities to introduce the new graduation requirements to local school personnel:

- Graduation Requirements Movie. This 20 minute film, produced under a contract with the Department of Education, provides some examples of survival-based education and a general explanation of the rationale behind the new requirements.
- One-day Workshops. These workshops were conducted in ten cities in October and November 1972 with the objective in order to gain a reaction to the ODE publications and to provide training for project managers, principals, superintendents, and other key school people.
- Guidance and Counseling Workshops. These eight workshops outlined the effects the new requirements would have on guidance and counseling.
- Oregon Small Schools Workshops. These workshops were held for schools having 1,000 or fewer students in the high school attendance center and the elementary schools feeding into it and elementary districts with fewer than 350 students, in order to acquaint the small school with the terminology of the new requirements, encourage the appointment of area project managers, and conduct writing skills programs.
- Television Shows. Five 30 minute television shows were presented through television stations KOAP and KOAC (Public Broadcasting) for the benefit of teachers, program coordinators, and the general public explaining the new requirements and various aspects of implementation. Video tape recordings of these programs were made available to local districts for their use.

- Informal ODE Field Contacts. It was estimated that the Oregon Department of Education staff members made between 500 and 1,000 contacts with local districts to answer specific questions concerning the new requirements (Oliver, 1974, p. 47).

Range of District Response in Implementation

The Oregon Department of Education is entering a cycle in which each year 20 percent of the 334 districts will be evaluated to determine their status in relation to the new standards. This means that we will not know from this source until 1981 the extent to which all school districts have complied with the new standards and then four-fifths of that information will be historical.

Given the extensive nationwide interest in the impact of the Oregon policies, a clear opportunity for developers to support and researchers to explore the impact of a statewide CBE mandate on the public school system has been created. The National Institute of Education seized that opportunity in 1975 when they developed the Oregon Competency Based Education Program in conjunction with the Oregon Department of Education, Oregon educators and citizens, and the Northwest Regional Educational Laboratory.

During the first year of the OCBE Program, evidence of the potential significance of a comprehensive study of CBE in Oregon has surfaced through the regional conferences, site

visits, training sessions, and resource and needs surveys conducted by the Program's development component and through the field explorations and a preliminary survey conducted by the research component[1] (See Appendix 2). Some responses from the survey are illustrative of this evidence. Approximately 70 percent of those surveyed indicated that as a result of recent policy or procedural changes, it is likely or very likely that students will more frequently work at a pace which is optimal for them and that students will more frequently participate in educational activities designed for them individually. Over 80 percent of the respondents indicated that students will learn more that will be of immediate utility, and almost 85 percent indicated that a significant percentage of the 1978 graduating class is likely to have serious difficulty graduating with their class because they will not have met some of the required graduation competencies.

As the survey indicates, some districts have generated a lot of activity as a result of the new standards. These districts have seen the new standards as an opportunity to develop a comprehensive educational plan that includes the spirit of the standards while meeting the compliance criteria. These districts

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[1] The survey respondents were superintendent-appointed Program liaison persons in school districts having secondary schools. Of 178 districts surveyed, 105 responses have been tabulated to date. Seventy-five percent of the respondents have rated their districts' progress as ahead of schedule or on schedule. These findings are only preliminary, as final tabulation analysis has not yet been completed (See Appendix 2).

are developing and experimenting with the broad elements of CBE for the solutions to their educational problems.

On the other hand, there are some districts who, for a variety of reasons, have taken a "wait and see" attitude toward the minimum standards and CBE. The reason for this may be size; they are too small to have the resources or too large to effectively manage the changes required of such a program. From the perspective of a local district, this may be the wiser choice as they see the trials and failures of the districts that have chosen to be the cutting edge of educational change in Oregon. One major goal of the OCBE Program research effort will be to identify, describe and explain the range of district responses to the Oregon CBE policy mandate. It is just such information that the 28 other states developing or exploring CBE mandates are seeking in order to optimize their policy decisions and support activities.

Implementation Schedule for the 1976 Standards

While the implementation schedule for the 1976 version of the Standards is less stringent than the original version, the passage of time still makes tight demands on the local districts. Local districts must, unless in unusual circumstances, meet the following schedule in implementing the new standards:

By September 1976:

All districts must have identified district goals.

All districts must have identified program goals.

All elementary districts must have developed programs in specified areas.

Planned course statements must have been written for all courses in grades 9-11.

All secondary districts must have identified minimum competencies for graduation.

By September 1977:

Course goals developed and adopted for each course or unit of study in grades 9-12.

Elementary programs must have been developed and implemented that lead to minimum competency attainment for graduation.

Planned course statements must have been written for all courses in grades 9-12.

All secondary districts must certify attainment of graduation competencies necessary to read, write, speak, listen, analyze and compute. (Must begin with the graduating class of 1978).

By September 1979:

All districts must conduct assessment in reading, writing and/or computation within three instructional programs.

All districts must have developed educational programs to allow individual students to meet the outcomes identified by the district.

By September 1980:

All districts must identify policies and procedures for making program improvements in at least reading, writing, and computing in programs selected for assessment.

All secondary districts must certify attainment for all graduation competencies (must begin with graduating class of 1981).

By September 1981

All districts must do assessment in reading, writing and/or computation within six instructional programs.

It should be noted that this brief list does not cover all the elements of the Minimum Standards. However, these are the essential deadlines districts must meet in implementing the instructional elements of the standards.

In the next chapter are discussed some of the issues and problems which have surfaced as Oregon districts seek to meet the CBE elements of Oregon educational policy.

Chapter 6

POTENTIAL PROBLEMS OF CBE

Oregon educators in their experiences with CBE have identified issues and problems which should be especially worthy of consideration by others making decisions about the nature and extent of their own involvement with CBE.

Confusion about "Competency"

The first problem in working with CBE is in saying what it is that should be or is being done. Oregonians linked several terms to "competency"--minimum, survival, life-role, graduation competencies.

> The problem, of course, was deciding what survival meant--perhaps some minimal number of skills needed for existance in our society? Or did survival refer to Maslow's notion of a needs hierarchy of which the first requirement is physical well being. Or did survival imply the ability to exist as a self-directive, self-fulfilled person? Did economic survival fit into the sequence? Should competencies be equated with knowledge and skills necessary to function as a producer and consumer, to function as a citizen, family member, or learner? (Evans, 1976, p. 36)

Each term, in turn, suggests further definitional issues. If, for example, we speak of life-role relevance, how do we select life-roles? How are they treated in educational settings? Basic questions about the purposes of schooling lie beneath the immediate question: What are we calling competency?

Lack of Criteria for Identifying Competencies

The Minimum Standards require each district to develop, adopt and verify student achievement of minimum competencies. This requirement was made when almost nothing about CBE had been done in public schools. Leadership had to come from within the state. The state department utilized Title III funds to support the efforts of six local district groups in preparing sample statements of minimum competencies. The results were synthesized by district and state staff into "Guidelines to Graduation Requirements." These were distributed to all local and intermediate districts in the spring of 1973, and districts were given until September 1974 to develop and adopt statements based on local priorities.

Neither levels nor numbers of competencies were specified, so it is not surprising that the products of these first efforts were widely varied in type and number. (The distribution of the number of competencies found in the OCBE Program is presented in Table 3.)

The range in numbers--from less than 20 to nearly 400--was one problem. Content presented yet another. Most districts wrote "enabler" type competencies (...can perform the four fundamental processes of arithmetic with whole numbers; ... can locate the main sentence in paragraph), while a few developed "application" competencies (...can balance a checkbook, involving ten withdrawals interspersed by three deposits; ...can read an apartment rental contract and specify the terms to which the lessor and lessee have agreed). Local districts, the State Department, and the project funded

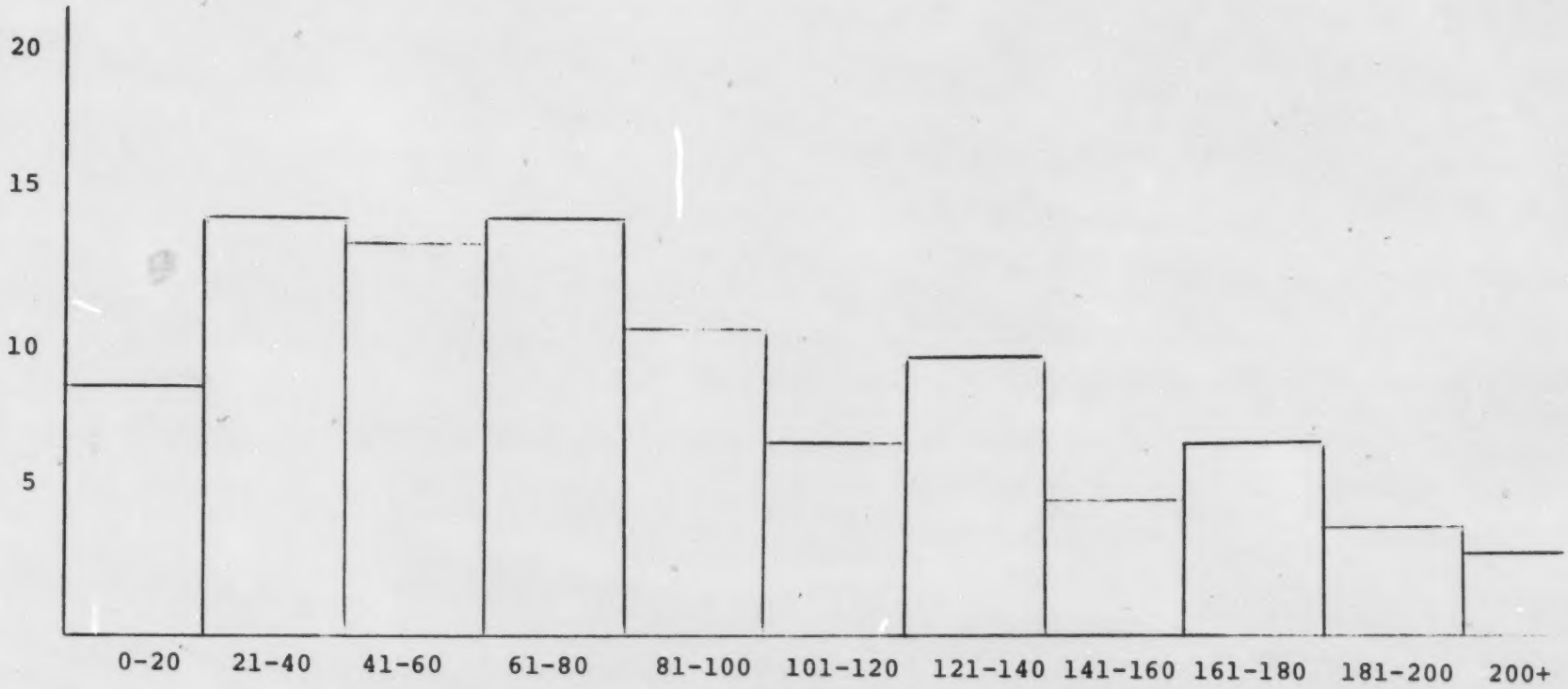

Table 3.
Number of specific competencies established by district.

by the National Institute of Education are working on this problem still.

Other questions that arose as local districts attempted to define graduation competencies included: Do these competencies represent a summation of the high school experience? Do the competencies deal with basic skills? Who determines what the competencies shall be? How do we fairly deal with students transferring from a district with one set of competencies to a district with a different set?

Limitations on Ability to Measure Competencies

There are serious issues to consider in the measurement of competencies. The first is technical. If we set forth a comprehensive set of graduation competencies, many will be outside our present capacity to measure objectively, validly, and reliably. Thus we are tempted to place the burden of measurement on the judgment of the teacher. Such judgment may be inequitable and may even suggest legal problems since students whose graduation is delayed on the basis of such "evidence" may challenge the decision.

Another critical measurement issue is that of timing. Testing must be done, not just at the close of the school experience, but at intervals that allow remediation. In light of what we know about achievement gains "washing out" we must also consider the desired firmness of competency attainment--and how to test for it.

Program Fragmentation

Program fragmentation is exemplified by instances in which elements of CBE, (and performance based education, or other outcomes-referenced systems,) such as explicit statements of instructional goals, are identified and adopted, but necessary system accompaniments to those elements are not introduced concurrently. In the case of "lone" goal statements, for example, descriptions of performance representing attainment of those goals, measurement items that translate those performance examples into manageable assessment terms, instructional sequences carefully geared to promote the goals, and management procedures sufficient to identify program weaknesses and introduce appropriate improvements or modifications accordingly, are all, in a well-structured and functioning CBE or PBE system, "necessary accompaniments" to instructional goals. Although the Oregon Standards clearly encourage such comprehensive programs, new programs may often of necessity be introduced in "pieces." In Oregon, given the requirement of high school graduation contingent upon demonstration of certain district determined, life-role related competencies, early introduction of isolated CBE program elements may sometimes focus on the determination of those graduation competencies, or on those competencies in addition to other instructional goals. If additional instructional goals are articulated, they are more likely to be stated at the generality level of the district goal and program goal, rather than at the course level. This is in part a function of the "timing" of the Standards require-

ments--course goals, as indicated earlier, are not absolutely necessary for district determination until September 1977.[2]

Inconsistency Between and Within Program Elements

Related to the "fragmented program" problem described above is the condition in which programs are operating that convey more than one approach to instruction. For example, performance-based or outcomes-based instruction may be operating in relation to promotion of "graduation competencies, while the remainder of the curriculum suggests "business as usual," or instruction in a more traditional, less objectives-oriented mode. In a sense, then, quite different programs may be operating side by side--programs that may imply real differences in underlying educational philosophy or in biases regarding effective teaching technology.

Once again, the condition may be temporary, and represent a necessary transition when comprehensive educational changes are undertaken. Nevertheless, it suggests a potential for confusion and apparently contradictory "themes" that affect all phases of instructional planning and decisionmaking.

One example of this type of internal program inconsistency at the course and class level is represented by the condition

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[2]This observation is not intended as a criticism of the "phasing in" aspect of the Standards timeline. On the contrary, various approaches to gradual program introduction are often cited as a desirable strategy in implementation literature. The point here is simply that such "phasing in" may sometimes carry other possible, albeit temporary, disadvantages as well.

in which "graduation competencies," determined by the district, are "assigned" to pre-existing high school courses for primary responsibility in terms of promoting those competencies. The rest of that mini-instructional system may even be complete. That is, the competency statements may be accompanied by related performance indicators, measures of competency attainment, descriptions of relevant instructional procedures to promote the competencies, and even by appropriate instructional management and recordkeeping procedures and materials. The result, when imposed on an existing course or class without similar modifications of that entire course structure to be consistent with outcomes-based instruction, is a program that suggests divergent and inconsistent instructional approaches.

Lack of Articulation Between Elementary and High School Instruction

Related to the example presented in the preceding subsection on inconsistency among program elements is the problem of misarticulation between elementary and high school instruction. Many of the competencies identified by school districts as necessary for high school graduation represent skills and capabilities that would generally be appropriately promoted in primary and elementary grades. By definition in Oregon, graduation competencies represent a basic set of life-role-related skills necessary for effective functioning in society. The set is minimal in the sense that it includes skills considered essential, rather than those that may be

considered desirable but not necessarily essential for independent functioning in a variety of life roles.

Such district-identified competency sets stated in general terms often include, for example, the ability to:

- read want ads
- balance a checkbook
- "comparison" shop.

Depending on the specific performances required by the schools for pupils to demonstrate attainment of those competencies, it would appear that skills such as those listed above, and other basic competencies which we would expect to represent the very least with which pupils should graduate from school, should generally be promoted in upper elementary grades. Sequenced en route skills leading to these and other competencies would likely appropriately be promoted beginning in the early primary grades.

The Oregon Standards require that elementary instruction be planned and implemented to promote the competencies required for graduation in the receiving high school. It appears, however, that many educators in Oregon do not feel that current programs reflect that close and systematic articulation between elementary and high school programs. Once again, during the early stages of transition to CBE program implementation, instruction that reflects careful sequencing of content and skill development culminating in competency attainment, and in the attainment of other desirable outcomes of schooling at the time when they are most appropriately and easily attained by students, may be a very tall order. Oregon

educators do recognize the problems created when, for example, basis competencies are first addressed in high school rather than in elementary school, or when critical en route skills to more advanced outcomes are not identified clearly as the responsibility of the elementary schools and thus must be assumed, by default and at the eleventh hour , by the high schools.

"Minimum" Goals Receive "Maximum" Attention

Lack of attention to articulation of elementary and secondary instruction reflects schooling that is, by definition, less efficient and effective than it might be. Related to the problem of coordinating schooling so that it promotes cumulative skill development, development that carefully builds on prerequisite skills and that reflects instruction sensible to learner receptivity or readiness, is the potential problem of "overattention" to graduation competencies. The two problems appear related in several ways--perhaps the most obvious example is in their short-sightedness--in the degree to which they suggest an educational planning perspective that is either too limited or again, too fragmented.

Graduation competencies, or those goals of schooling considered essential for functioning in society, should be perceived and treated with "balance" in the broader context of the total curriculum. However, during the period of transition from a traditional to a more outcomes-oriented

approach to schooling, and particularly in instances in which the attainment of graduation competencies will be among the first types of educational accomplishments likely to receive public scrutiny, the promotion of those competencies may receive overemphasis in the schools, and attention to other important goals of schooling may assume "second place." Even in those areas in which competencies, when appropriate, are designated for initial instructional focus in elementary school, rather than inappropriately introduced in high school, the danger of these limited goals "looming too large" in the planning and delivery of instruction may persist.

A more balanced and comprehensive view of the entire curriculum should inform instructional planning at every level of schooling. Particularly in the early phases of transition to competency based education, an almost stubborn attention to the potential problem of inordinate focus of attention on graduation competencies may be necessary. The question of how much of the schools' resources should be directed toward insuring a minimum level of skill attainment in all pupils--as opposed to promoting skills far beyond the minimum--in fewer pupils - is of course, not ultimately answerable by simple self-reminders that minimum competencies represent only a small portion of the desired outcomes of schooling. The somewhat competing priorities are reflected, in an exaggerated manner, by examples of "minimum outcomes" as opposed to outcomes that are likely to be attainable by only a few pupils.

School resource allocations are one reality from which inference may be drawn about such priorities. The

question is not as sharp as suggested by the extreme examples, and instructional programs are possible that neglect either ends nor centers of the outcome continua. The critical point is that such programs be planned on the basis of careful decisions regarding the relative importance of various educational goals - rather than on the basis of unshared, and perhaps even unconscious, assumptions about these priorities.

Program Adoption Confused with Program Implementation

A final example of a potential problem related to the implementation of CBE programs, whether in response to the Oregon Standards or to any other impetus for change, is that of inadequate or ineffective implementation of program changes. Although statements and documents regarding intended program changes may be made, the discrepancy between stated changes, or adoptions, and actual implementation of change, may be great. This potential problem may be summarized by the inquiry: "is anything different really happening?" A related question is, "if so, is the different thing that is happening what was supposed to happen," or, "have you implemented what you adopted?"

In specific terms, in Oregon, inadequate program implementation may be observed, for example, when instructional goals are adopted but not used to plan or guide instruction and evaluation.

Lack of Preservice and Inservice Training

Competency based education, unlike many educational innovations, was neither conceived nor nurtured within the colleges and universities. A major issue, then, concerns their acceptance or rejection of CBE as a viable tool for elementary and secondary educators, and more particularly, concerns the communication of CBE concepts and purposes to these institutions who have traditionally prepared teachers to enter elementary and secondary schools they knew well. This was no longer true under the new state mandated system in Oregon and the stance of the colleges and universities in responding to new needs and in contributing to new developments was unclear.

The problem is really a larger one of preparing new as well as practicing teachers and other personnel for new demands on their skills, and doing so effectively, with appropriate and successful incentives.

State Mandated vs. Voluntary Implementation

In Oregon, whether implementation should be required or voluntary is a moot point since the issue has been decided, in the form of a mandate, by the Oregon Board. The issue may still be relevant to other systems, however, and the advantages and disadvantages can only be weighed in relation to the circumstances within a particular system.

One of the most difficult problems in the Oregon mandated system has been one of communicating essential and desired

information about the meaning of standards, the routes to compliance, adequate models, etc.

Scheduling compliance raises questions about the fairness of schedules, the penalties to be levied against districts that do not comply, equitable modification of schedules, and the effects of time schemes on the students served.

Possible Causes

What, then, are some likely causes, or factors contributing to the types of problems described in the preceding subsections? Some have already been suggested in the discussion:

- phasing-in program elements in accordance with prespecified compliance dates;
- instructional planning not guided by comprehensive view of the total curriculum;
- instructional planning not guided by careful decision-making regarding curricular priorities or educational priorities.

Additional causes contributing to these conditions probably include, but are not limited to, the following:

- inadequate procedures for communication and joint planning between elementary and high school staffs, and other relevant groups;
- inadequate staff skills related to analyzing, planning and sequencing instruction to promote specific learner outcomes.
- inadequate staff skills related to planning and implementing outcomes-references evaluation activities;

- incomplete understanding of the characteristics, and potential advantages and disadvantages of competency based education procedures, their critical relationships to one another in an operating CBE system, and potential "models" within that system.
- lack of "tools," in the form of materials and procedures to accomplish specific planning, implementation, and evaluation tasks in the context of a competency based education program.

CONCLUSION

However great the potential problems of CBE and however complicated their causes, many still find that the potential promise of CBE outweighs its difficulties. Accordingly, the Oregon Competency Based Education Program is addressing the problems of CBE in conjunction with educators and educational decisionmakers throughout Oregon in an attempt to help remove the obstacles to the implementation of CBE and thus help realize its promise to improve the quality and productivity of education.

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APPENDIX I

Minimum Standards
(Adopted 23 June 1976)

APPENDIX I

MINIMUM STANDARDS
(Adopted 23 June 1976)

Definitions

Definitions

581-22-200 The following definitions apply to Oregon Administrative Rules 581-22-200 through 581-22-300, unless otherwise indicated by context:

(1) "Analyzing": mental processes by which individuals identify interrelationships within an entity and develop ability to make new applications;

(2) "Assessment": activities designed to secure and organize information describing student performance in specified subject matter at a given time;

(3) "Board": the State Board of Education;

(4) "Career Education": learning experiences enabling students to make career choices and develop attitudes, knowledge and skills needed for the producer (occupational) life role and for related aspects of other life roles. It includes awareness and exploration of work, preparation for occupations and specialization in a specific occupation;

(5) "Citizenship/Government Education": study of structures and functions of government and the human relations skills and understandings necessary for individuals to work productively with each other;

(6) "Competency(ies)": a statement(s) of desired student performance representing demonstrable ability to apply knowledge, understanding, and/or skills assumed to contribute to success in life role functions. (Each statement usually covers related tasks, contains a performance (action) verb and describes an outcome from which verifiable standards of achievement may be determined. The statement may relate to several goals);

(7) "Computing": manipulation of math symbols through fundamental processes of addition, subtraction, multiplication, and division;

(8) "Conditionally Standard School": a school having failed to meet provisions of the minimum standards but for which the local board has adopted and submitted a plan, subsequently approved by the Superintendent, for correcting deficiencies;

(9) "Consumer Education/Economics/Personal Finance": instructional activities to help students cope with consumer concerns in our economic system, including money management, credit, purchasing goods and services, and rights and responsibilities in the marketplace;

(10) "Course Goals": statements of desired learner outcomes for each course or unit of study in grades 9 through 12;

(11) "Credit by Examination": ascertaining student achievement for waiving course requirements and, if appropriate, granting credit;

(12) "Department": the Department of Education;

(13) "Diploma": the document a local unified or union high school district issues attesting to the holder's having:

(a) Demonstrated minimum competencies the local board has adopted for graduation,

(b) Completed requirements for earning the Board's 21 units of credit (OAR 581-22-226) and any additional units of credit the local board specifies,

(c) Completed 12 school years of educational experience, or the equivalent, as authorized by local board policies adopted in conformance with these rules;

(14) "District Goals": statements of broad, general learner outcomes a local district and its community see as desirable consequences of instruction and relevant to attaining Board Goals for Elementary and Secondary Education (OAR 581-22-201);

(15) "Elementary School": an organizational unit of any combination of grades kindergarten through 8;

(16) "Goals": statements of desired learner outcomes at various instructional levels (district, program, course);

(17) "High School": an organizational unit composed of any combination of grades 10 through 12 in districts providing a junior high school containing grade 9; any combination of grades 9 through 12 organized in a separate unit; grades 9 through 12 housed with grades kindergarten through 12; grades 7 or 8 through 12 if Department approved;

(18) "Junior High School": an organizational secondary school unit composed of any combination of grades 7, 8, and 9 organized separately from other grades in the system and Department approved;

(19) "Language Arts/English": communication disciplines contributing to skills in reading, writing, speaking and listening;

(20) "Middle School": an organizational elementary school unit composed of any combination of grades 5, 6, 7 and 8 organized separately from other elementary grades in the system and identi-

fied as a middle school with the Department;

(21) "Minimum Standards": rules for public elementary and secondary schools found in Division 22 of the Board's admistrative rules;

(22) "Nonstandard School": a school having failed to meet provisions of the minimum standards and within ninety days of the Superintendent's notification of deficiencies not having submitted a plan of correction or adhered to the plan of correction the Superintendent received and approved. A nonstandard school is deficient for purposes of ORS 327.103;

(23) "Performance Indicator": an established measure to judge student competency achievement;

(24) "Planned Course Statement": a course title, a course overview, course goals and, where appropriate, minimum competencies;

(25) "Procedure": a specified routine method to be followed in complying with requirements of administrative rules and in implementing board-adopted policies;

(26) "Process": specified actions which insure validity of the results of a procedure;

(27) "Program": a planned series of interdependent activities or services contributing to the attainment of a common goal or set of goals;

(28) "Program Goals" (Instructional): statements of desired learner outcomes for each district instructional program in any combination of grades kindergarten through 12;

(29) "Program Goals" (Support): outcomes of a program in a school system to support the entire system or one or more of its components, usually stated in terms of service to be performed;

(30) "Program Improvement": using assessment and needs identification information in making program revisions that reduce needs identified;

(31) "Program Needs Identification": development and application of procedures for specifying and prioritizing differences between actual learner outcomes and desired outcomes of program instruction sufficient to warrant considering program revision;

(32) "Reading": purposeful thinking processes by which an individual interprets written symbols as meaningful words and ideas;

(33) "Required Courses of Study": instructional programs under OAR 581-22-218 through OAR 581-22-236 prescribed by ORS 326.051(d). Guides the Department develops and issues shall provide further definition of assistance for local program implementation;

(34) "Social Studies/History": systematic study of societies and their activities.

(35) "Standard School": a school having met provisions of the minimum standards.

(36) "Superintendent": the State Superintendent of Public Instruction;

(37) "Unit of Credit": successful completion of a minimum 130 clock hours of classroom or equivalent work identified as part of a planned course. Equivalent work may include independent study, work experience, and research time;

(38) "Writing": written representation of a language following a systematic order designed to clarify and express thought.

Goals

Goals for Elementary & Secondary Education

581-22-201 (1) The Board, in response to the changing needs of Oregon learners, sets forth six goals for the public schools.

(2) Conceived and endorsed by Oregon citizens, the statewide goals are designed to assure that every student in the elementary and secondary schools shall have the opportunity to learn to function effectively in six life roles: INDIVIDUAL, LEARNER, PRODUCER, CITIZEN, CONSUMER, and FAMILY MEMBER. Each goal suggests the knowledge, skills, and attitudes needed to function in these life roles.

(3) The statewide goals shall be implemented through the district, program and course goals of each local school district. These local goals are set by schools and communities together to fulfill a mutual responsibility for the education of every student. Because most of the knowledge and skills needed to function effectively in the role of LEARNER are acquired in school, the school has primary responsibility for helping students achieve this goal.

(4) Each school and its community should establish priorities among the goals to meet local needs, and allocate their resources accordingly. This process should provide each student with the opportunity to achieve the requirements for graduation from high school, and as much additional schooling as school and community resources can provide.

(5) Each individual will have the opportunity to develop to the best of his or her ability the knowledge, skills, and attitudes necessary to function as a (an):

(a) "Individual": to develop the skills necessary for achieving fulfillment as a self-directed person; to acquire the knowledge necessary for achieving and maintaining physical and mental health and to develop the capacity for coping with change through an understanding of the arts, humanities, scientific processes, and the principles involved in making moral and ethical choices;

(b) "Learner": to develop the basic skills of reading, writing, computing, spelling, speaking, listening, and problem-solving; and to develop a positive attitude toward learning as a lifelong endeavor;

(c) "Producer": to learn of the variety of occupations; to learn to appreciate the dignity and value of work and the mutual responsibilites of employees and employers; and to learn to identify personal talents and interests, to make appropriate career choices, and to develop career skills;

(d) "Citizen": to learn to act in a responsible manner; to learn of the rights and responsibilites of citizens of the community, state, nation, and world; and to learn to understand, respect and interact with people of different cultures, generations and races;

(e) "Consumer": to acquire knowledge and to develop skills in the management of personal resources necessary for meeting obligations to self, family, and society;

(f) "Family Member": to learn of the rights and responsibilites of family members, and to acquire the skills and knowledge to strengthen and enjoy family life.

Accreditation

Administration of the Standardization Program

581-22-202 (1) The Board develops and issues minimum standards for Oregon public schools under authority of ORS 326.051. All public schools must comply with these minimum standards and Board administrative rules. These standards are not applicable to community colleges defined in ORS 341, except for program requirements for granting adult high school diplomas.

(2) The Superintendent initiates standardization visits to public elementary and secondary schools on a regularly scheduled basis and at other times as necessary. A public school desiring an official standardization appraisal at other than scheduled times shall present a written request to the Superintendent. The school will be classified after an official standardization visit.

Assignment of Standardization Classification

581-22-204 (1) An official standardization classification is assigned to each school in a district after Department personnel supervise an on-site appraisal.

(2) Classifications shall be:

(a) Standard school;

(b) Nonstandard school;

(c) Conditionally standard school.

(3) A local district with one or more nonstandard schools shall be found deficient and classified nonstandard and must submit a plan of correction to the Superintendent pursuant to ORS 327.103(3). The plan of correction shall provide specific steps to correct each deficiency, a completion date for correcting each deficiency and the date the local board approved the plan. When the Superintendent approves the plan of correction, the classification of the local district will become conditionally standard.

(4) A conditionally standard classification indicates a temporary status. Failure of the local district to meet terms of the correction plan shall cause the classification of the district to revert to nonstandard, until such time as it adheres to the plan or it amends and the Superintendent approves the plan.

(5) When a local district classified as conditionally standard has completed its plan of correction and district officials certify the district is meeting all provisions of these minimum standards, the Superintendent may change the classification of the district to standard.

Waiver Provisions

581-22-206 (1) In administering the standardization program, the Department shall encourage school districts to develop instructional programs exceeding minimum standards as well as carefully planned pilot or experimental programs. When a special program or independent textbook adoption necessitates deviation from the standards, a school district shall submit a description of its proposal and secure approval prior to implementing the change. Approval, if granted, will be for a specified time and may be followed by a Department evaluation of the program.

(2) When local district officials believe it not feasible to comply with a specific standard in a school or schools, they may petition the Superintendent for a waiver.

(3) The petition for waiver shall:

(a) Identify the specific standard for which the waiver is requested;

(b) Specify why the district cannot reasonably comply with the standard;

(c) Specify how the district is compensating to provide for the education, health and/or safety of the children affected;

(d) Identify a maximum time for which the waiver is requested.

(4) The Superintendent shall recommend to the Board approval of such waivers and deviations when the local superintendent provides satisfactory written assurance that district needs and intent of minimum standards are being met. The Superintendent shall specify the time any approval shall be in

effect.

(5) Petitions for waivers and deviations modifying requirements specified in the "Oregon Revised Statutes" shall not be approved.

Instructional Planning

Instructional Planning

581-22-208 Each local district shall adopt and implement a system of instructional program planning and assessment to provide for:

(1) Sets of goals including:

(a) District goals, adopted by the local board, by 9-1-76,

(b) Program goals contributing to achievement of district goals by 9-1-76,

(c) Course goals contributing to achievement of program goals by 9-1-77;

(2) Assessment in reading, writing and/or computing within three instructional programs by 9-1-79 and six by 9-1-81 and reporting results to the local community. Such assessment shall:

(a) Occur after determining if reading, writing and/or computing skills must be developed or applied for students to achieve program goals, and

(b) Use valid measurement procedures;

(3) Needs identification related at least to reading, writing and computing for programs assessed and setting priorities for addressing such needs by 9-1-80. This process shall include local board review of needs identified and priorities set;

(4) Policies and procedures for making program improvements by 9-1-80 at least in reading, writing and computing in programs selected for assessment.

Instructional Program

Educational Program

581-22-218 To provide all students opportunity to achieve district-adopted learner outcomes, requirements for graduation and personal goals through participation in educational programs relevant to their needs, interests and abilities, each local district shall by 9-1-79 adopt procedures to:

(1) Identify individuals' learning strengths and weaknesses;

(2) Provide learning opportunities for students responsive to their needs;

(3) Determine progress students make in their educational program;

(4) Maintain student progress records and report the information to parents and students.

Elementary Instructional Programs

581-22-221 Students in local districts having any combination of grades kindergarten through eight shall by 9-1-76 receive instruction in language arts, mathematics, science, social studies, health education, physical education, music education and art education. Local boards may grant exemptions when required by students' religious or cultural beliefs, or for students with special physical, sensory, or other handicaps.

Elementary Instruction Applicable to Required Competencies

581-22-222 Local districts shall by 9-1-77 establish procedures to insure instruction in any combination of grades kindergarten through eight to provide students with opportunities to acquire knowledge and skills applicable to minimum competencies required for graduation adopted for receiving schools.

Graduation Requirements (Class of 1977)

581-22-224 Each local district enrolling students in grades 9 through 12 shall offer subjects to enable students to meet the following graduation requirements for the graduating class of 1977:

(1) Three units (30 semester hours) in language arts/English;

(2) Two units (20 semester hours) in social studies. The social studies series requires courses in United States history/government and modern problems, or equivalent Board-approved work;

(3) Two units (20 semester hours) in health education and physical education;

(4) One unit (10 semester hours) in science;

(5) One unit (10 semester hours) in mathematics;

(6) Ten units (100 semester hours) in elective subjects unless local board policy prescribes additional work in certain subjects.

Graduation Requirements

581-22-226 (1) Each local district enrolling students in grades 9 through 12 shall implement Board-adopted high school graduation requirements beginning with the graduating class of 1978.

(2) Credit Requirements for high school program completion:

(a) Each student shall earn a minimum 21 units of credit in grades 9 through 12;

(b) Units of credit shall be earned in the following areas of study:

(A) Language Arts/English–3

(B) Mathematics–1

(C) Social Studies/History–1

(D) Citizenship/Government–1

(E) Science–1

(F) Health Education–1

(G) Physical Education–1

(H) Consumer Education/Economics/Personal

Finance–1

(I) Career Education–1

(J) Electives–10

(c) Local boards may alter the number of units of elective credits;

(d) Local boards may establish additional credit requirements beyond the minimum number.

(3) Planned course statements shall be written for courses in grades 9 through 11 by 9-1-76 and in grade 12 by 9-1-77 and shall be available to students, staff, parents, local board, and interested citizens.

Diplomas and Certificates of Competency

581-22-228 (1) The local board shall award a diploma upon fulfillment of all state and local district credit, competency and attendance requirements.

(2) The local board may grant a certificate identifying acquired minimum competencies to students having met some but not all requirements for the diploma and having chosen to end their formal school experiences.

Performance Requirements for Program Completion

581-22-231 (1) Student transcripts shall record demonstration of minimum competencies necessary to:

(a) Read, write, speak, listen;

(b) Analyze;

(c) Compute;

(d) Use basic scientific and technological processes;

(e) Develop and maintain a healthy mind and body;

(f) Be an informed citizen in the community, state, and nation;

(g) Be an informed citizen in interaction with environment;

(h) Be an informed citizen on streets and highways;

(i) Be an informed consumer of goods and services;

(j) Function within an occupation or continue education leading to a career.

(2) The local board shall by 9-1-76 adopt and make available to the community minimum competencies it is willing to accept as evidence students are equipped to function in the society in which they live. Students need not develop all competencies within the formal schooling process. Schools shall provide necessary instruction for those who need it. The local district shall identify performance indicators used for competency verification.

(3) The local district may alter performance indicators for competencies or the local board may declare a policy for granting waivers to substitute competencies appropriate to unique needs and abilities of individual students.

Attendance

581-22-232 (1) Twelve school years, beginning with grade one, of planned educational experience shall be required, except as local boards adopt policies providing early or delayed completion of all state and local program, credit and performance requirements.

(2) Local boards may adopt policies to allow credit by examination or allow credit for off-campus experiences.

(3) Local boards are encouraged to adopt policies allowing individual program completion in more or less than twelve school years.

(4) In any modification of the attendance requirements for graduation, the administrator shall consider age and maturity of students, access to alternative learning experiences, performance levels, desires of parents or guardians, and local board guidelines.

Developing Appropriate Electives and Additional Course Offerings Beyond State Minimums

581-22-234 Local districts are encouraged to develop elective offerings providing students opportunities to earn a minimum ten elective units of high school credit. As indicated in OAR 581-22-226(2), however, the minimum number of elective units of credit may be altered if the local district increases the number of required units of credit. These electives shall be structured in terms of identified student needs for diverse experiences in vocational, scientific, fine arts, modern language and humanities education.

Local District Responsibility for Implementation

581-22-236 Each local district enrolling students in grades 9 through 12 shall implement the competency component of its graduation requirements as follows:

(1) Establish minimum competencies and performance indicators beginning with the graduating class of 1978;

(2) Certify attainment of competencies necessary to read, write, speak, listen, analyze and compute beginning with the graduating class of 1978;

(3) Certify attainment of all competencies beginning not later than with the graduating class of 1981.

Administration

Operating Policies and Procedures

581-22-238 Each local district shall keep rules adopted pursuant to ORS 332.107 and operating

policies and procedures, and shall make such information available upon request.

Personnel Policies

581-22-241 (1) Each local district shall maintain personnel policies including, but not confined to, the following:

(a) An affirmative action plan assuring equal employment opportunities;

(b) Position descriptions, job requirements and evaluation procedures for all personnel;

(c) A liaison system between the local board and its employees.

(2) Personnel policies shall be provided to all school employees and made available to the public.

Equal Educational Opportunities

581-22-242 Each local district shall provide equal educational opportunities for all students under any educational program or activity the Board administers or authorizes. Students shall have equal opportunity to participate in programs and equal access to facilities:

(1) Regardless of national origin, race, religion, sex, marital status or family financial condition (this standard not intended to modify attendance boundaries nor to limit placement by race in legally approved programs of desegregation);

(2) Regardless of age or handicap, except when either age or handicap can be shown to conflict with legal limits or the requirements of a program;

(3) Regardless of primary or home language other than English.

Records and Reports

581-22-244 Each local district shall complete and forward promptly all reports the Department requires.

Bonded Employees

581-22-246 Each local district shall cause all employees responsible for funds, fees, or cash collections to be covered under a board-approved bond.

Accounting of Funds

581-22-248 (1) Student activity funds and other fee or cash collections shall be examined annually by a local board-approved, independent accountant.

(2) The local district shall adopt policies defining "student activity funds" and prescribe specific purposes for which each such fund may be used.

(3) "Student activity funds" shall be used only for purposes described by local district policies adopted in compliance with this rule.

Evaluating Student Transcripts

581-22-251 In evaluating student transcripts, the administrator shall:

(1) Accept satisfactory 9th grade attendance and satisfactorily completed units of 9th grade credit from a standard Oregon junior high school on the same basis as when completed in a four-year Oregon high school;

(2) Accept minimum competencies, credits and attendance completed in a standard Oregon school as if they had been earned in the administrator's own district;

(3) For out-of-state transfer students:

(a) Accept units of credit and attendance completed in standard secondary schools as if the requirements had been completed in this state;

(b) Determine which local district minimum competencies the student must demonstrate to meet the district requirements for graduation;

(4) For students from a private, alternative, or nonstandard public secondary school:

(a) Determine the value of credits;

(b) Determine which local district minimum competencies the student must demonstrate to meet the requirements for graduation;

(c) Determine the number of years of school attendance or equivalent;

(5) Determine grade placement for elementary students enrolled in grades kindergarten through 8;

(6) Determine the value of credits obtained through correspondence courses as applicable to meeting state and local requirements for graduation;

(7) Determine the value of credits obtained in an approved community college program as applicable toward meeting state and local requirements for graduation.

Required Days of Instruction

581-22-252 Each local district shall schedule and provide an annual school year consisting of a minimum 175 days of actual classroom instruction (time students are present for a major portion of a scheduled school day, engaged in learning experiences related to district goals and under guidance of teachers). Up to five days of temporary closure due to extraordinary conditions may be counted toward the 175 days, subject to the Superintendent's approval.

Student Services

District Guidance and Counseling

581-22-254 Each local board shall by 9-1-76 approve a district guidance and counseling program to support the educational development of each student by:

(1) Developing goals including but not limited to:

(a) Developing decision-making skills,

(b) Obtaining information about self,

(c) Understanding opportunities and alternatives available in educational programs,

(d) Setting tentative career and education goals,

(e) Accepting increasing responsibility for one's actions,

(f) Developing skills in interpersonal relations,

(g) Utilizing school and community resources;

(2) Identifying individual guidance needs in relation to Goals in OAR 581-22-201 and goals in (1) of this rule;

(3) Specifying instructional, guidance and counseling activities utilized in achieving guidance goals;

(4) Assigning guidance responsibilities to each school;

(5) Defining the rationale to be used for assigning teachers, counselors or other specialists;

(6) Coordinating programs in grades kindergarten through 12;

(7) Specifying methods for program evaluation.

School Guidance and Counseling

581-22-256 Each school guidance and counseling program shall by 9-1-76 be based on a written plan:

(1) Specifying goals including but not limited to those assigned in the district program;

(2) Specifying staff assignments in accordance with the rationale in the district program;

(3) Providing counseling assignments consistent with certification rules;

(4) Identifying instructional, guidance and counseling activities used to achieve guidance goals.

Student Records

581-22-258 Each local board shall adopt a policy which:

(1) Conforms to statutes for access to and dissemination of information in student records;

(2) Provides for maintaining permanent student records to include:

(a) Full name of student,

(b) Student birth date,

(c) Parents'/guardians' names,

(d) Date of entry into the school,

(e) Name of school previously attended,

(f) Subjects taken,

(g) Marks received and/or credits earned,

(h) Attendance,

(i) Date and reason for leaving school,

(j) Such additional information as the district may prescribe;

(3) Provides for the permanent record to be retained in a minimum one-hour fire-safe place in the school, the local district or intermediate education district office, or for keeping duplicate permanent records in a safe depository outside the building;

(4) Provides for transferring student progress records to another educational institution upon receipt of notice of enrollment;

(5) Provides for transferring behavioral records to another educational institution only upon request of the student's parents, guardian, or the student if 18 or over.

Health Services

581-22-261 Each local district shall by 9-1-76:

(1) Develop a plan identifying health services needed by and provided for students enrolled in its schools;

(2) When employing school nurses, assure qualifications include an Oregon nursing license to practice as a registered nurse.

Staff & Class Load

Certificated Personnel

581-22-262 Each local district shall employ teachers and administrators who hold valid Oregon certificates and shall assign them in accordance with each person's certificate.

Teacher Aides

581-22-264 A local district employing teacher aides shall follow Board rules relating to teacher aides.

Daily Class Size

581-22-266 Each local district shall establish class sizes at all grade levels and in all instructional areas considering curriculum content, instructional method, needs of students, and expected learning outcomes of a particular class.

Media & Materials

Media Centers

581-22-268 Each local district shall by 9-1-76 provide in each school a center offering organized media services and materials consistent with district program and course goals. This center shall be located appropriately to serve needs of the instructional program and staff shall be assigned consistent with certification rules.

Materials Selection and Purchase

581-22-271 Each local district shall by 9-1-76 establish procedures for selecting and purchasing instructional materials.

Equipment Purchase

581-22-272 Each local district shall by 9-1-76 establish procedures to coordinate evaluating and

purchasing instructional equipment to insure quality and compatibility of equipment with needs of teachers and students.

Facilities

Facilities

581-22-274 Each local district shall provide site and building environments appropriate for the district instructional and support program activities and for human physical needs.

Furniture, Equipment, Materials

581-22-276 Each local district shall provide equipment and materials to support programs and activities to implement district goals.

Building Program and Plans

581-22-278 (1) Each local district shall obtain Department approval of the district:

(a) Building program to include planned and projected school population, grade levels served, nature of immediate neighborhood and greater community, educational philosophy, policy regarding community involvement and use of school facilities, activities to be accommodated by both building and site, desirable relationships between various activities, the desired character of the school and its educational outcomes;

(b) Preliminary drawings–to scale, clear, accurate–describing proposed construction or remodeling work by means of floor plans, elevation drawings, sectional drawings, and site plans describing project scope, size, shape, configuration, fenestration, and general interrelationships of building elements, and relationship of building mass to site and site development;

(c) Outline specifications indicating general scope of project and types of structural, mechanical and lighting systems, building materials, exterior and interior finishes, and site development particulars.

(2) Each local district shall subsequently obtain Department approval of working drawings and specifications (architectural contract documents) clearly, accurately and completely describing proposed construction.

Safety

Emergency Plans and Safety Programs

581-22-280 Each local district shall be responsible for management of a current comprehensive employee-student emergency plan and safety program for all departments and programs under its jurisdiction.

Safety Inspection Practices

581-22-282 Each local district shall conduct and document regularly scheduled safety inspections of all property under its jurisdiction.

Accident Prevention In-Service

581-22-284 Each local district shall conduct an accident prevention in-service program for all employees.

Accident Reporting Systems

581-22-286 Each local district shall maintain an accident reporting system for accidents on district property, or involving employees, students or visiting public.

Safety Devices

581-22-288 All schools shall provide necessary safety devices and instruction for their use for students and adults.

Auxiliary Services

Pupil Transportation Services

581-22-292 Pupil transportation provided at local district expense shall comply with applicable statutes and Board rules.

Bus Inspection and Maintenance

581-22-294 Buses shall be constructed, equipped, maintained, and inspected in accordance with applicable statutes and Board rules.

School Bus Drivers

581-22-296 School bus drivers shall possess a valid Oregon School Bus Driver's License and shall comply with applicable statutes and Board rules.

School Food Services

581-22-298 Local districts operating reimbursed student food service programs shall comply with Board and State Health Division rules.

Custodial Services

581-22-300 Buildings and grounds shall be maintained to provide conditions conducive to health and safety of all persons.

APPENDIX II

DISTRICT RESEARCH PROGRAM SURVEY

Appendix II

OREGON COMPETENCY BASED EDUCATION

DISTRICT RESEARCH PROGRAM SURVEY

August 1976

Number:_____

Responses listed

N=105

Questions pertaining to this
questionnaire should be addressed to
Joseph Olexa at (503) 484-2123
Oregon Research Institute
Eugene, Oregon 97403

N = 105

OCBE DISTRICT SURVEY

Approximately how many competencies has your district developed which all students in the class of 1978 must pass in order to graduate (graduation competencies)?

Number of Competencies	9 - 300 $\bar{X}$ = 89

Is your district presently adapting or modifying these competencies? (Check one)

a.	Yes	84.6 %
b.	No	15.4

Indicate all grade levels during which students are normally expected to be certified on graduation competencies. (Check all that apply)

a.	1-6	20.0 %
b.	7th	40.0
c.	8th	49.5
d.	9th	99.0
e.	10th	98.1
f.	11th	97.1
g.	12th	90.5

What is your estimate of the percentage of graduation competencies in your district that are certified on the basis of: (estimate percentage)

a.	Standard district-wide procedures and tests	$\bar{X}$ = 41.4 %
b.	Standard district-wide procedures with tests determined by individual teachers	$\bar{X}$ = 45.1 %
c.	Procedures and tests determined by individual classroom teachers	$\bar{X}$ - 69.2 %

In your district, to what extent does certification in the graduation competencies rely on the judgment of individual classroom teachers? (Check one only)

a.	Exclusively	33.0 %
b.	To a considerable extent	47.6
c.	To a small extent	13.6
d.	Individual teacher judgment is rarely used for this purpose	5.8

6. What portion of students in your district are certified in the graduation competencies by tests, activities or events individualized for the particular student? (Check one only)

a.	All students	8.0 %
b.	Most students	14.0
c.	A few students	59.0
d.	None	19.0

7. Please indicate those changes in the experiences of students in general that are expected to result from recent policy or procedural changes in your district. (Use one check for each of a-f)

	Very Unlikely	Unlikely	Likely	Very Likely	Don't Know
a. Students in general will have an increased opportunity to select courses of their own choice.	10.8	28.0	39.8	21.5	%
b. Individual students will more frequently work at a pace which is optimal for them.	7.5	24.7	45.2	22.6	%
c. Students will more frequently participate in educational activities designed for them individually.	5.3	25.5	58.5	10.6	%
d. Individual students will more frequently negotiate with their teacher the course objectives the students will pursue for credit.	13.0	48.9	32.6	5.4	%
e. Students in general will learn more that will be of immediate utility to them than has been true in the past.	6.5	13.0	54.3	26.1	%
f. Students in general will increase their achievement in basic skills of reading, writing, and computation.	2.1	7.4	38.9	51.6	%

8. A. What is the minimum number of elective and required units of credit a student must have to graduate from your district in 1976-77?

a. Minimum required credits	$\bar{X}$ = 24.1
b. Minimum elective credits	$\bar{X}$ = 20.5

B. In 1977-78?

a. Minimum credits required	$\bar{X}$ = 24.4
b. Minimum elective credits	$\bar{X}$ = 19.8

9. What is your estimate of the percent of the 1978 senior class which is likely to have serious difficulty graduating with their class only because they will not have met some of the required graduation competencies? (Check one only)

a. About 0%	16.8 %
b. About 5%	44.2
c. About 10%	26.3
d. About 15%	5.3
e. About 20%	3.2
f. About 25% or greater	4.2
g. Don't know	- -

10. A. If a student should fail to be certified on some graduation competencies on schedule (say in grade 10) what options can the student exercise in order to demonstrate the required competency in 1976-77?

a. Take the course over	80.4 %
b. Make up the work on his or her own	62.7
c. Take another regular course which teaches the same competencies	78.0
d. Attend a special remedial program offered in the summer or after school	29.4
e. Attend a special "make up" program or competency lab offered during the regular school day	46.1
f. Make the work up at another accredited institution (e.g., community college)	42.2
g. Other (specify)_____	9.8
h. Don't know	1.0

B. If a student should fail to be certified on some graduation competencies on schedule (say in grade 10) what options can the student exercise in order to demonstrate the required competency in 1977-78?

a. Take the course over	79.6 %
b. Make up the work on his or her own	68.0
c. Take another regular course which teaches the same competencies	84.2
d. Attend a special remedial program offered in the summer of after school	31.1

e.	Make the work up at another accredited institution (e.g., community college)	49.5 %
f.	Other (specify) _____	24.3
g.	Don't know	1.0

11. If a member of the class of 1977 were behind in completing graduation requirements, which of the following will routinely be informed of the requirements the student must meet in order to graduate on schedule (Check all that apply)

a.	The students	96.0 %
b.	The parents	95.0
c.	The counselor	91.1
d.	The home room teacher or student's advisor	48.5
e.	The principal or vice principal	77.2
f.	A regular classroom teacher	43.6
g.	A district staff specialist	10.9
h.	No one will routinely be informed	2.0
i.	Other (please specify)_____	4.0

12. If a member of the class of 1978 were behind in completing graduation competencies, which of the following will routinely be informed of the competencies the student must meet in order to graduate on schedule? (Check all that apply)

a.	The student	97.1 %
b.	The parents	96.2
c.	The counselor	91.3
d.	The home room teacher or student's advisor	51.9
e.	The principal or vice principal	81.7
f.	A regular classroom teacher	51.0
g.	A district staff specialist	14.4
h.	No one will routinely be informed	1.0
i.	Other (please specify) _____	3.8

13. In response to the minimum standards, approximately when, in your district, did individuals or groups officially begin working on the following?

		Quarter/Year or Month /	Work Has Not Begun	Don't Know
a.	Setting district goals	_____/___	_____	_____
b.	Setting program goals	_____/___	_____	_____
c.	Setting course goals	_____/___	_____	_____

	Quarter/Year or Month /	Work Has Not Begun	Don't Know
d. Setting graduation competencies	____/____	____	____
e. Planning a district program assessment	____/____	____	____
f. Planning a district needs identification	____/____	____	____
g. Preparing competency tests or examinations or selecting performance indicators	____/____	____	____
h. Deciding in which courses to teach the graduation competencies	____/____	____	____
i. Developing a recording system for student progress on the graduation competencies	____/____	____	____

14. Which of the following has required, to date, the most effort from your district? (Check one only)

a. Setting district goals	7.5 %
b. Setting program goals	2.2
d. Setting course goals	17.2
e. Setting graduation competencies	52.7
f. Planning program assessments	1.1
g. Conducting a district needs identification	2.2
h. Preparing examinations of the graduation competencies	3.2
i. Deciding in which courses to teach the graduation competencies	1.1
j. Developing a recording system for student progress on the graduation competencies	12.9

15. How much time has your district Board of Education devoted to the implementation of the minimum standards in your district?

a. A great amount of time	11.8 %
b. A moderate amount of time	34.3
c. A small amount time	49.0
d. No time at all	4.9

16. Which of the following best describes the amount of staff resources your distri has invested in planning for the minimum standards?

a.	Our district has placed a great deal of staff resources into planning for the minimum standards.	37.9 %
b.	Our district has placed a moderate amount of staff resources into planning for the minimum standards.	36.9
c.	Our district has placed a small amount of staff resources into planning for the minimum standards.	19.4
d.	Our district has placed virtually no staff resources into planning for the minimum standards.	5.8

17. Indicate which groups and individuals have given formal input into the following. (Check all that apply)

		Community Representatives (excl. Board)	School Board	Superintendent	District Specialists	Building Administrators	Teachers or Teacher Committees	External Consultants or Experts	Students	Does Not Apply
a.	Setting district goals	60	65	73	39	71	79	17	39	3 %
b.	Setting program goals	28	25	52	44	71	89	22	20	4 %
c.	Setting course goals	12	14	36	41	69	96	24	25	1 %
d.	Setting graduation competencies	39	43	64	46	81	97	28	29	0 %
e.	Planning program assessment	4	10	29	36	42	47	18	6	21 %
f.	Identifying district needs	38	34	49	36	59	65	19	25	15 %
g.	Preparing examinations of the graduation competencies	1	6	12	31	48	79	11	4	8 %
h.	Deciding in which courses to teach the graduation competencies	5	8	34	39	79	96	8	6	2 %
i.	Developing a recording system for student progress on the graduation competencies	3	4	32	48	75	69	18	1	3 %

18. a. Did citizens from the community formally participate in the selection and definition of the district-level goals for your district?

a. Yes (if yes, please go to question 18-b.)	59.2 %
b. No (if no, please go to question 18-c)	22.3
c. Such goals have yet to be developed (skip to question 20)	18.4

b. (If yes to question 18-a) How was citizen participation carried out? (Check all that apply)

a. School Board meetings	49.2 %
b. Public announcement & public meetings	32.8
c. Meetings where selected members of the community were invited	60.7
d. Established a select citizen committe to establish goals	39.3
e. Other (please specify_____ _____ _____ (Skip to 19)	14.8

c. (If no to question 18-a) What, in your opinion, contributed most to the lack of citizen participation in the setting of district-level goals: (Check one only)

a. Failure to announce & publicize meetings	0.0 %
b. Citizen apathy	5.0
c. No policy for community involvement was established	95.0
(Skip to 20)	

19. Was the participation of the citizens helpful or not in the development of the district-level goals and competencies?

a. Very helpful	45.2 %
b. Somewhat helpful	51.6
c. Not helpful	1.6
d. More a hindrance than a help	1.6

20. Considering the variety of changes that have taken place or may take place in your district under the minimum standards, which of the following groups or individuals strongly support at least some of these changes? (Check all that apply)

a.	There is no strong support in any quarter	14.3 %
b.	The school board	60.2
c.	The superintendent	74.5
d.	Some building administrators	71.4
e.	Some faculty members	78.6
f.	Some students	39.8
g.	Some parents	67.3
h.	One or more special interest groups	11.2

21. Which of the following groups or individuals strongly oppose at least some of the actual or intended changes? (Check all that apply)

a.	There is no strong opposition in any quarter	56.6 %
b.	The school board	11.1
c.	The superintendent	11.1
d.	Some building administrators	20.2
e.	Some faculty members	42.4
f.	Some parents	22.2
g.	One or more special interest groups	9.1

22. How do you rate the progress of your district in implementing the state minimum standards?

a.	Ahead of schedule	32.0 %
b.	On schedule	42.0
c.	Behind schedule	26.0

23. In your opinion, which districts in the state are the best models for competency based education?

See last page for responses

24. Please rate the importance of the following factors in prompting changes in your district's goal structure (i.e., district goals, program goals, course goals, and competencies required for graduation) in the last five years. (One check each for a, b, c, and d)

		Very Important	Somewhat Important	Not Important
a.	The state minimum standards	77.0	20.0	3.0 %
b.	District needs identification	12.8	61.7	25.5 %
c.	Community pressure	8.0	36.0	56.0 %
d.	District commitment toward self-improvement	70.6	23.5	5.9 %

25. Please rate the importance of the following factors in prompting changes in your district's instructional programs in the last five years. (One check each for a, b, c, and d)

	Very Important	Somewhat Important	Not Important
a. The state minimum standards	52.0	41.0	7.0 %
b. District need identification	33.3	49.0	17.7 %
c. Community pressure	9.3	49.5	41.2 %
d. District commitment toward self-improvement	70.6	25.5	3.9 %

26. Please rate the importance of the following factors in prompting changes in your district's student evaluation procedures in the last five years. (One check each for a, b, c, and d)

	Very Important	Somewhat Important	Not Important
a. The state minimum standards	45.0	36.0	19.0 %
b. District need identification	24.2	44.4	31.3 %
c. Community pressure	7.4	40.0	52.6 %
d. District commitment toward self-improvement	58.4	35.6	5.9 %

27. Please rate the importance of the following factors in prompting changes in your district's record-keeping procedures in the last five years. (One check each for a, b, c, and d)

	Very Important	Somewhat Important	Not Important
a. The state minimum standards	70.3	24.8	5.0 %
b. District need identification	14.6	36.5	49.0 %
c. Community pressure	5.2	19.8	75.0 %
d. District commitment toward self-improvement	53.0	33.0	14.0 %

28. Please estimate how likely it is that students in general will spend more time in each of the following areas, as a result of recent policy or procedural changes in your district. (Use one check for each of a-f)

	Very Unlikely	Unlikely	Likely	Very Likely	Don't Know
a. In talking to teachers or counselors in order to select courses	2.0	6.9	38.2	52.0	1.0 %
b. In working on the basic skill areas of reading, writing, and computation	1.0	3.0	40.0	56.0	- - %
c. In learning in settings outside the classroom	5.1	14.1	47.5	24.2	9.1 %
d. In relatively active pursuits such as writing, speaking, and performing or demonstrating skills	1.0	8.0	45.0	38.0	8.0 %
e. In formal assessment activities as a basis for placement in courses	2.0	21.8	44.6	22.8	8.9 %
f. In formal evaluation activities designed to assess competency	1.0	6.9	38.6	47.5	5.9 %

29. Are student performance data (grades 9-12) collected through district assessment or testing programs on a regualr basis? (Check One)

a. Yes	63.0 %
b. No	37.0

30. Where might we obtain a description of the assessment program if such a program exists?

Name_____

Telephone Number_____

Position_____

Please place the completed questionnaire in the return envelope provided and mail to Oregon Research Institute.

Thank you for your cooperation.

"In your opinion, which districts in the state are the best models for competency based education?"

	N
Albany UH 8 J	7
Baker School District 5J	2
Beaverton School District 48J	10
Condon School District 25	2
Dayton School District 8	1
Detroit School District 123J	1
Eugene School District 4J	9
Hillsboro UH 3JT	1
Hood River School District 1	2
Klamath Falls UH 2	1
Lake Oswego School District 7	1
Medford School District 549	1
Neah-Kah-Nie District 56	1
North Marion School District 15	1
Parkrose School District 3	8
Portland School District 1J	2
Salem School District 24J	9
Sherwood School District 88J	1
Dallas School District 2	2
Fern Ridge School District 28J	1
McMinnville School District 40	3
Sheridan School District 48J	1
Springfield School District 19	4
North Clackamas School District 12	1
Amity School District 4J	2